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Advertising Age

Big 3 TV nets play it safe

By Joe Mandese

The new fall TV shows are now in place, and there's no clear projected network leader as advertisers get ready to plunk down billions of prime-time dollars over the next two months.

After a sneak preview of the new schedules last week, agency media executives said the possibility exists either ABC or CBS next fall could overtake NBC, last season's narrow ratings winner.

The executives also said the relatively conservative scheduling strategies unveiled by the networks did little to break up a pack that's grown increasingly tighter in both household and demographic audience delivery.

Agency executives maintained NBC's just-concluded May sweeps victory doesn't necessarily suggest new momentum for the network, which finished last season just barely ahead of ABC and CBS in household ratings and behind them in some key demographics.

"We're looking at a situation where

just a little tweak here and there could cause a change in the standings," said Jack McQueen, senior VP-general manager of FCB/Telecom, Burbank, Calif.

Overall, Mr. McQueen said, the new lineups are based on "familiar stars, safe premises and no big surprises. This is not a situation of one network doing a really good job of scheduling at this point. It's sort of even across the board."

"I've only seen pieces of shows, but there doesn't appear to be anything that is of breakout potential," said Joel Segal, exec VP-director of national broadcasting at McCann-Erickson Worldwide, New York. "I don't see anything that is going to take a network in a time period from a 15 to a 30 share, but I've only seen pieces of the shows."

However, even one or two successful new series launches could make the difference that catapults a network from third to first place, said Paul Schulman, president of Paul
(Continued on Page 36)



"The Royal Family"/CBS: "Everyone is crazy about it," an agency executive says. "There's a good buzz on it."



"Step by Step"/ABC: "The show will have to rely on the strength of the kids' characters," an agency buyer says.

New TV shows: Hits and misses

Preliminary predictions of agency media buyers based on their screenings of initial pilots and programming clips.

THUMBS UP:



- "The Adventures of Mark & Brian" (NBC)
- "The Commish" (ABC)
- "Home Improvement" (ABC)
- "Pacific Station" (NBC)
- "Princesses" (CBS)
- "The Royal Family" (CBS)



THUMBS DOWN:

- "I'll Fly Away" (NBC)
- "Nurses" (NBC)
- "P.S. I Luv U" (CBS)
- "Man of the People" (NBC)
- "Home Front" (ABC)
- "Eerie, Indiana" (NBC)



"Man of the People"/NBC: "Based on the pilot, it will fail. It was awful. . . . NBC is supposed to be redoing it," a buyer says.

LAST MINUTE NEWS

Texas questions GM ads

DALLAS—The Texas attorney general is threatening to sue General Motors and agency McCann-Erickson Worldwide, New York, for alleged deceptive advertising. At issue is a corporate campaign for the Cadillac division's winning of the U.S. Department of Commerce's 1990 Malcolm Baldrige National Quality Award. Representatives of the attorney general and GM plan to meet this week to try to reach agreement on a consent judgment. The formal notice of intent to sue contends the ads misrepresented the award in six instances, including the number of applicants and a statement that the department had praised Cadillac's 4.9-liter engine and its Customer Relations Center. A GM spokesman said the company already corrected advertising regarding the number of applicants but said GM contends the advertising otherwise was "accurate and not misleading."

Ayer adds Green to board

NEW YORK—N W Ayer named Marvin Green Jr., 54, former ceo of Reeves Communications Corp., as its first outside director amid rumors Green had bought as much as 5% of the privately held agency to make what one source called a
(Continued on Page 8)

INSIDE



BusinessTrack: Computers pace agency move, efficiency. **Page 22**



AdTest: New column puts Post on spot. **Page 38**

Camel vs. Marlboro

New Ninety Nines entry will box with the leader

By Judann Dagnoli

R.J. Reynolds Tobacco Co. is trying to break from the pack with a line extension of Camel cigarettes being promoted as if it were a new free standing brand.

The company in July starts marketing on the West Coast Camel Ninety Nines, which despite its name is equivalent to a 100-millimeter-size Camel filter. Ninety Nines will come in hard-box style only.

With the introduction, RJR appears to be following an industry trend of giving established brands new twists to make news in the \$40 billion market, already jammed with nearly 400 brands.

Though a line extension of RJR's 75-plus-year-old flagship brand, Camel Ninety Nines' different name "is to make it stand out from the competition," said Peggy Carter, manager of media relations.

RJR said Camel Ninety Nines is aimed at both women and men, specifically smokers of Philip Morris USA's market leading Marlboro. But industry experts are confused at the target audi-

ence, noting that while cork tips and box styles appeal to men, 100-millimeter brands have their biggest following among women.

What is clear is that with Camel Ninety Nines, RJR is trying to play catch-up to the Marlboro box.

Camel's current hard-pack share is estimated at 0.8%, com-

Competitive sources dismissed the new moniker as a gimmick to attract attention to what amounts to new packaging.

pared with 12.4% for box versions of Philip Morris' Marlboro, according to John C. Maxwell Jr., an industry analyst at Wheat, First Securities. Overall, Marlboro held a 25.7% market share in 1990, compared with 4.4% for No. 6 Camel, he said.

RJR already markets three Camel line extensions in 100-millimeter sizes: Camel Filters, Camel Lights and Camel Ultra Lights. But only Camel Ultra

Lights is now sold in a box.

Camel Ninety Nines will be sold in lights and filter versions only.

Competitive sources, noting that RJR's Camel is underrepresented in box styles, dismissed the new moniker as a gimmick to attract attention to what amounts to new packaging.

But rivals such as Philip Morris have tried similar strategies, industry executives said, although with less gimmickry.

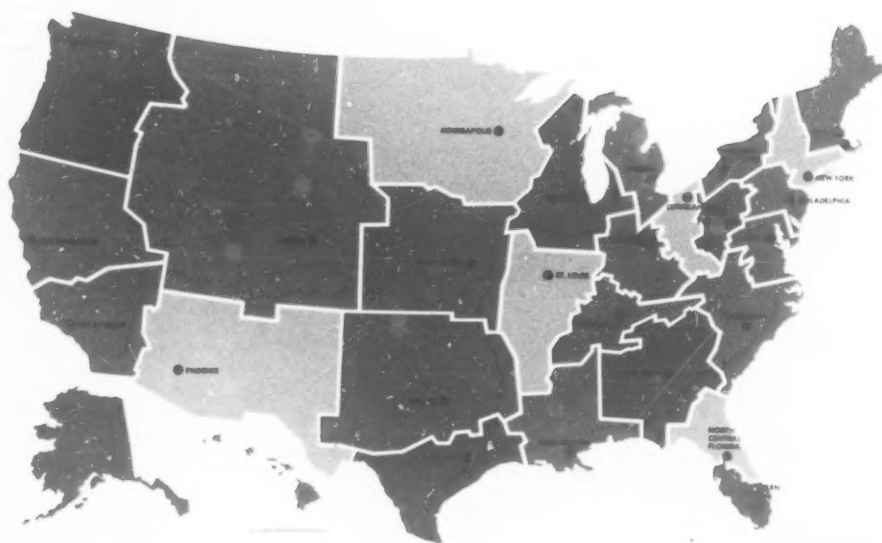
One example is new Marlboro Medium, which has less tar than regular Marlboro but 1 milligram more tar than Marlboro Lights. Medium is cork-tipped, while Lights is not.

Advertising for Marlboro Medium breaks in June issues of consumer magazines via Leo Burnett USA, Chicago.

Camel Ninety Nines is being supported with a teaser outdoor campaign that broke earlier this month. Created by Camel agency Young & Rubicam, New York, advertising shows the Hard Pack, a group of cartoon camel characters playing musical instruments.

The drummer, dubbed "Eddie,"
(Continued on Page 37)

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NEWS SUMMARY

- **R.J. Reynolds Tobacco Co.** will introduce Camel Ninety Nines on the West Coast in July. **1**
- **Environmental advertising** recommendations were issued by a task force of 11 state attorneys general last week, including specific green marketing terms. **3**
- **Food & Drug Administration** Commissioner David Kessler last week met with Federal Trade Commission regulators, apparently to discuss coordinating actions on health claims and prescription drug advertising. **3**
- **George Green** of Hearst Magazines will push to end ad bans as new president of the International Federation of the Periodical Press, meeting in Helsinki this week. **3**
- **Nabisco** will start testing My Goodness! low-fat, no-cholesterol cookies in West Coast markets in July. **3**
- **Lintas:Worldwide** named Kenneth L. Robbins chairman-ceo, to succeed William Weithas. **4**
- **Rochelle Lazarus** was named president of Ogilvy & Mather's flagship New York office. **4**
- **Ad agency jobs** are in short supply, this year's college graduates discover. **4**
- **Beer marketers** plan stepped-up promotional activities this summer following a slow start for the year. **6**
- **American Express and Visa** will begin ad campaigns to boost card use while dining out. **6**
- **Sparkling wine** marketers plan warm-weather advertising tied to holidays and special events. **6**
- **Brut** men's fragrance starts a \$10 million-plus campaign this week featuring spokeswoman Kelly LeBrock. **8**
- **Newspapers** are using U.S. Census data to help advertisers target audiences and to seek out new readers. **12**
- **MCI Communications** is advertising on outdoor boards in eight cities to show running tabulations of the money it says customers are saving vs. AT&T. **12**
- **Embassy Suites'** new ad campaign touting value rather than discounting is themed, "Twice the hotel." **12**
- **Magazine ad page volume** in April was down 11.1% from a year ago, according to Publishers Information Bureau. Ad revenues for the first four months were off 5.1%. **31**
- **Uncle Ben's** is testing its first non-rice products, Uncle Ben's Meal Makers, a line of vegetable-based sauces. **32**
- **Slim-Fast Foods** is adding shelf-stable entrees to its growing line of diet products. **33**
- **NutraSweet Co.** breaks a \$25 million marketing campaign this week as more competition looms. **33**
- **Alcoholic beverage industry's** new Century Council unveiled a code of marketing and advertising practices and will support efforts to promote responsible drinking. **34**
- **Patriotic themes** in ads aren't likely to sway consumers, according to a survey by Valentine-Radford. **38**

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AGENCIES SLOWER To Add BENEFITS FOR FAMILIES

To workers putting in steady overtime, concern for their home life may seem like the furthest thing from the corporate mind. Yet, personnel managers at marketing, media and advertising companies claim family-oriented benefits increasingly are the focus of plans.

"The average core benefits plan was put together when Daddy was working and Mommy was home with 2.2 kids. Today something like 4% of the work force meets that profile, so companies are trying to respond," says Freddy Gamble, personnel director for Conde Nast.

After examining the benefits of major companies in each field, agencies are furthest behind in family-oriented benefits.

Only 13.3% and 53.3% of shops polled offer job sharing and part-time tracks, respectively, while 66.7% of marketers offer both and 73.3% of media companies offer job sharing and 80% part-time tracks. Shops also fell well short of the other companies in offering childcare and elder-care referrals, paternity leave and flex time. □

Employee matters

Gannett leads media companies in benefits

	Maternity leave	Paternity leave	Vaca. days after 1 yr.	Personal days	Overtime pay	Comp time	Christmas bonus	On-site childcare	Childcare referrals	Elder-care referrals	Telecommuting	Extended leave	Part-time track	Job sharing	Parking	Dress codes	Flexible hours	Summer hours	Minorities on board	Women on board
Continental Cablevision	10	NA	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Reader's Digest	15+	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Meredith Corp.	10	2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Gannett Co.	10	3	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Conde Nast	10	3	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Knight-Ridder	7-21	2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Time Warner	20+	2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Washington Post	15	0	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Los Angeles Times	10	3	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Advo-Systems	10	2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Don Jones & Co.	10	4+	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Westinghouse Electric Corp.	10	0	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Rocky Mountain News	10	0	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
McGraw-Hill	10	2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Houston Post	10	2	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5

* unpaid
** executive committee members
† various restrictions apply
‡ varies by division or office

VIDEO

(Continued from Page 22)
Channel.

A one-hour video conference between the U.S. and the U.K. now costs about \$1,330 on Sprint Meeting Channel; the highest rate is about \$3,500 to Moscow.

"That's about what a plane ticket costs for one executive to get to the Soviet Union," says Mr. Miller. This way, "you can have several in one meeting."

Three years ago, it cost Unisys \$228,000 to install video conferencing equipment in a Detroit meeting room. Now the company could purchase "better equipment, bigger picture screens, using half the band [transmission] width, for half the price," says John Champa, manager and chief engineer, Unisys Video Conferencing Network.

In 1990, Unisys held 962 video conferences with 12,200 conferees, using 5,664 video conference hours at 11 video conference sites.

"We realized a net savings of \$2.7 million in our travel budget," Mr. Champa says.

But shaving the travel budget is "not how we justified the system," Mr. Champa says. Video conferencing has allowed executives to meet more

regularly, in a face-to-face situation, he says.

Apple Computer Co. uses its video conferencing network both internally between designers, engineers and marketing executives and as a sales tool to confer directly with potential customers.

"In the course of a day, [Apple Chairman-CEO] John Sculley can drop into a session, along with VPs and product managers, and we find that's a very effective selling element," says Donna Collins, project manager of Apple's Video Conference Network in Cupertino, Calif.

Apple also has wired Macintosh computers into its video conferencing network, allowing full-color graphics and animation to be transmitted during a meeting.

Apple averages 80 video conference hours monthly and has installed seven video conference rooms—six in the U.S. and one in Paris—at a cost of \$115,000 to \$300,000 each.

The newest meeting room in Paris "has been booked constantly since we opened it in January," Ms. Collins says. "At first, I thought it was due to the Gulf War, but usage levels have not dropped since it ended." □

Laurie Freeman is a free-lance writer based in Ann Arbor, Mich.

COMPUTER

(Continued from Page 22)
about 90 employees have computers; however, 30 are Donovan terminals in the media unit that will be replaced by PCs.

The most difficult part of the whole process is how to integrate the media department, says Gary Wenzel, senior VP-director of account planning.

The agency has decided against Donovan because of its need for dedicated terminals and inability to be tied into the network, says Mr. Mancuso.

"Donovan is the industry standard, and it's very good," he says. "But any time you want to manipulate data in a Donovan terminal, it has to be rekeyed into a Mac or IBM terminal and downloaded into a PC. If we achieve this network, an account

executive with a Mac on his desk can get [a client's] media expenditures by tapping a key."

RP&A executives are leaning toward acquiring a DSI Datatrak package but are still analyzing whether it can perform all of the networking functions they require. If they pick up Datatrak, they will run it through a Hewlett-Packard minicomputer and will use Macintosh software for creative functions and Lotus programs for most accounting and back-room functions.

RP&A is spreading out expenses over two years and will pay cash for the system out of agency profits. "We're also going to lease what we can," Mr. Mancuso says. "Vendor financing is generally the better way to go. So we won't have to go to the bank." □

Jack Feuer is a Los Angeles-based free-lance writer.

When Ryder Truck Rental was ready to move...



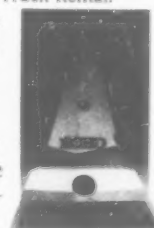
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Magazine ad page leaders

Publishers Information Bureau figures for January through April 1991.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Bride's	1,251.45	(3.4)	23,140,994	1.1
2	Modern Bride	1,007.88	(1.7)	16,579,050	(2.4)
3	Business Week	951.10	(19.6)	56,349,600	(18.9)
4	People	946.08	(10.9)	98,383,455	(2.6)
5	Forbes	920.05	(20.6)	41,563,118	(17.6)
6	Vogue	885.13	(11.5)	35,641,246	(2.3)
7	TV Guide	832.14	(19.5)	98,067,287	(11.9)
8	The Economist	735.31	(14.3)	6,871,600	(6.6)
9	Fortune	705.85	(25.9)	36,433,590	(22.4)
10	Entrepreneur	703.60	3.9	7,541,584	17.8
11	Sports Illustrated	676.30	(17.0)	91,207,308	(11.5)
12	New York Magazine	666.55	(19.9)	11,252,215	(13.5)
13	Time	656.25	(18.1)	97,927,829	(12.1)
14	Cosmopolitan	622.65	(2.0)	40,109,925	7.2
15	Golf World	616.16	(0.9)	5,337,302	10.1
16	Glamour	567.88	2.7	30,440,177	7.6
17	Elle	553.58	(18.8)	18,013,167	(10.9)
18	Newsweek	529.72	(23.2)	61,154,601	(20.1)
19	Good Housekeeping	526.87	0.5	54,421,768	10.7
20	U.S. News & World Report	515.24	(11.4)	43,247,348	(7.7)
21	Family Circle	515.18	(4.2)	44,173,649	0.5
22	The New Yorker	500.67	(32.5)	14,044,988	(25.6)
23	GO	497.83	(19.9)	13,166,833	(12.8)
24	Ladies' Home Journal	497.46	(0.1)	37,761,770	7.6
25	Muscle & Fitness	479.34	15.0	8,725,483	22.5
26	Sunset	476.66	(2.2)	14,385,286	(4.3)
27	Skin Diver	475.31	6.7	4,851,627	18.0
28	Yachting	467.98	(18.5)	3,016,255	(12.7)
29	American Way	465.76	(13.8)	7,044,279	(2.9)
30	Golf Magazine	464.91	(5.3)	16,479,974	15.4
31	Parents	445.25	0.8	19,734,241	9.0
32	Rolling Stone	443.69	(19.7)	17,736,916	(9.1)
33	Travel & Leisure	442.36	(11.5)	18,414,493	(8.1)
34	Popular Photography	422.67	6.5	9,638,119	1.4
35	Texas Monthly	415.24	(3.2)	4,703,168	0.1
36	Better Homes & Gardens	415.03	9.5	49,911,420	17.6
37	W Magazine	409.13	(22.8)	9,901,428	(18.4)
38	Southern Living	406.87	(6.6)	21,325,541	(0.2)
39	Car & Driver	404.17	7.3	15,874,240	11.0
40	Golf Digest	401.15	(15.9)	23,619,415	2.4
41	Mademoiselle	398.39	(17.0)	13,782,028	(12.7)
42	Architectural Digest	394.70	(32.0)	10,891,124	(29.9)
43	Salt Water Sportsman	380.75	(19.7)	2,743,139	(11.0)
44	Money	377.59	(5.8)	25,076,309	2.4
45	Harper's Bazaar	376.90	(21.1)	10,861,520	(14.7)
46	Vanity Fair	376.29	(15.7)	12,903,810	(16.3)
47	Redbook	361.25	0.6	24,263,918	9.0
48	Gourmet	346.15	(12.8)	10,519,708	(0.6)
49	Bicycling	341.02	(2.3)	5,216,000	8.0
50	Seventeen	340.72	(24.2)	11,434,879	(11.4)
51	Road & Track	340.59	3.5	10,055,769	3.2
52	Jet	334.50	(1.3)	5,884,305	3.4
53	McCall's	333.87	9.2	26,530,537	22.4
54	Mirabella	323.12	(12.6)	6,285,168	11.5
55	Ebony	322.78	(12.8)	12,269,674	(4.8)
56	Bassmaster	314.84	(1.5)	6,424,746	3.0
57	Country Living	308.56	(13.4)	13,380,965	(7.8)
58	Woman's Day	307.64	(31.7)	23,518,987	(29.0)
59	Bon Appetit	307.25	(12.4)	9,635,080	(9.4)
60	Condé Nast Traveler	305.35	(17.0)	9,029,742	(12.5)
61	Self	298.35	(27.3)	12,333,349	(20.5)
62	Four Wheeler	295.23	2.3	2,710,607	24.5
63	Reader's Digest	293.44	(16.3)	31,088,656	(15.2)
64	Town & Country	292.46	(40.6)	8,184,183	(31.7)
65	Smithsonian	291.59	(12.2)	12,693,412	(10.7)
66	House & Garden	290.38	(16.3)	7,764,678	(9.4)
67	Metropolitan Home	287.04	(31.6)	10,353,806	(20.5)
68	Ski	286.96	(2.0)	5,941,902	1.0
69	Working Woman	282.85	(14.3)	9,100,701	(8.6)
70	Computer	278.99	1,000.0	2,445,924	100.0
71	Motor Trend	277.45	3.2	10,622,089	8.6
72	Inc.	272.67	(11.7)	12,486,977	(3.9)
73	Outside Magazine	270.18	15.5	5,137,533	25.8
74	Esquire	269.92	(30.3)	8,455,523	(27.0)
75	Sports Afield	269.28	(4.6)	5,464,862	5.6
76	Field & Stream	265.53	(9.1)	12,249,340	2.9
77	Outdoor Life	262.24	(2.7)	8,649,887	9.0
78	San Francisco Focus	258.99	(28.0)	1,789,868	(25.0)
79	New Woman	258.06	(14.4)	7,225,745	(2.8)
80	Delta Sky	257.84	(9.8)	7,380,665	1.2
81	Automobile Magazine	257.63	9.3	6,717,762	56.0
82	Art & Antiques	250.64	(15.2)	1,873,749	8.8
83	Black Enterprise	248.00	(11.7)	3,707,609	(0.9)
84	Entertainment Weekly	241.78	14.1	5,479,773	21.4
85	Parenting	240.09	13.6	5,503,395	50.8
86	Popular Mechanics	237.26	(7.5)	8,466,673	4.4
87	Yankee	233.12	(9.6)	3,176,671	4.8
88	Penthouse	230.75	11.8	9,320,117	10.9
89	Premiere	230.15	(10.7)	4,533,001	1.6
90	Playboy	230.10	3.2	14,498,305	(1.9)
91	Skiing	229.64	(0.2)	4,688,853	(1.1)
92	Omni	229.52	9.3	6,139,872	(5.9)
93	Essence	229.43	(15.9)	6,392,511	(3.9)
94	Tennis	226.93	(1.4)	7,697,146	8.2
95	Hot Rod	226.52	(12.0)	5,513,217	(7.5)
96	House Beautiful	225.01	(4.8)	9,010,137	4.3
97	Working Mother	224.27	(7.7)	5,425,596	3.6
98	Scientific American	218.03	57.6	4,789,859	32.0
99	Financial World	216.65	(39.2)	5,068,196	(39.1)
100	Shape Magazine	213.84	7.4	3,739,361	(2.5)

Percent change compares January-April in 1991 with 1990. Source: Publishers Information Bureau.

MEDIAWORKS

April still a cruel month

By Scott Donaton

The second quarter's magazine ad page volume is beginning the way the first quarter ended: on a sour note.

Publishers Information Bureau reported ad pages dipped to 15,037.2 in April, down 11.1% from last year. Pages for January through April totaled 50,647, down 10.1% from the same period in 1990.

Ad revenues through April hit \$2.02 billion, a 5.1% decline. Seven of the top 10 ad categories (ranked by revenue) were down after four months, with nine categories also down in pages. The top 10 accounted for 74% of the total magazine revenues through April.

"There are no signs here yet of a broad-based recovery," said James Guthrie, exec VP-marketing development for Magazine Publishers of America. But he pointed to revenue gains in the automotive, direct response and computer categories as bright spots.

The number of magazines mired in the ad slump continued to grow in April. Only one of the top 10 ad page leaders was up in pages through April, compared with three through March: *Entrepreneur* continued to thrive, carrying 703.6 pages through April, up 3.9%.

While *Bride's* remained the ad page leader, its 1,251.5 ad pages were down 3.4% from the first four months last year. *People*, which managed to post a 1% gain in pages for the first quarter, saw pages dip 30.2% in April to 283. That loss dragged its year-to-date

total to 946.1, a 10.9% decline.

In the newsweekly field, *Time's* 656.2 ad pages were down 18.1%, *Newsweek's* 529.7 pages were off 23.2% and *U.S. News & World Report's* 515.2 pages marked an 11.4% decline.

"The market is very competitive, and I don't think it's going to get better until 1992," said Peter Eldredge, U.S. publisher of *News-*

Gardens (415 pages, up 9.5%); *Redbook* (361.2 pages, up 0.6%); and *McCall's* (333.9 pages, up 9.2%).

Family Circle carried 515.2 pages, a 4.2% dip. *Woman's Day's* 307.6 pages were off 31.7%.

Black-oriented magazines are also feeling the sting of the recession. Category leader *Jet* saw pages through April fall 1.3% to

Top 10 magazine ad categories by revenue

Category	1991 revenue	% chg	1991 pages	% chg
Automotive*	\$293,193,470	6.62	5,277.2	(1.0)
Toiletries & cosmetics	\$199,035,224	(1.11)	4,158.2	(10.63)
Direct response cos.	\$197,554,008	6.98	6,505.0	(0.40)
Food	\$145,289,960	(10.17)	2,369.3	(17.23)
Apparel**	\$138,888,203	(5.59)	4,844.7	(9.32)
Travel, hotels & resorts	\$129,239,113	(14.36)	4,093.3	(13.69)
Business & consumer svcs.	\$117,238,524	(30.45)	3,340.3	(28.24)
Cigarettes & tobacco	\$92,629,872	(6.16)	1,461.2	(15.52)
Computers & office equip.	\$79,684,095	21.59	1,701.6	15.25
Publishing & media	\$66,379,498	(3.79)	890.0	(8.85)

Revenue and page figures are from January-April 1991. *Includes accessories and equipment. **Includes footwear and accessories. Source: Publishers Information Bureau.

week.

The women's service field continued to post fairly strong numbers through April, though several publishers in the category said they expect figures to drop off in May and June.

Four of the Seven Sisters registered ad page increases after four months and one, *Ladies' Home Journal*, was flat with 497.5 pages, down 0.1%.

Good Housekeeping led the pack with 526.9 pages, up 0.5%. Also up were *Better Homes &*

334.5. Ebony, with 322.8 pages, was down 12.8%. *Black Enterprise's* 248 pages marked an 11.7% falloff. And *Essence's* pages were down 15.9% to 229.4.

The Sunday magazines published by *The New York Times* and *Los Angeles Times* posted ad page declines of 23.4% and 31.1%, respectively, with 967.3 and 242.3 pages. National Sunday magazines fared better: *Parade's* 252.4 ad pages through April were up 18.3%, and *USA Weekend*, with 213 pages, was down 3.2%. □

Media prefer shared liability

ATLANTA—A February survey of 700 media companies showed joint and several liability is the most pervasive form of contract, reports Szabo Associates, a media collection specialist.

"Though there is no industry-wide liability clause, joint and several liability does appear to be the trend," said Szabo President Peter Szabo. Under joint and several liability, both agency and advertiser are liable for all payments.

The American Association of Advertising Agencies earlier this year recommended its members adopt sequential liability as the basis of their contracts with the media, making agencies liable for payments only after advertisers have paid the agencies. The Four A's in the past had endorsed sole agency liability.

With defaulted and delinquent media payments on the rise, the change in Four A's thinking has sparked disputes among agencies, advertisers and media. Few agencies have implemented sequential liability; even fewer media companies have accepted it.

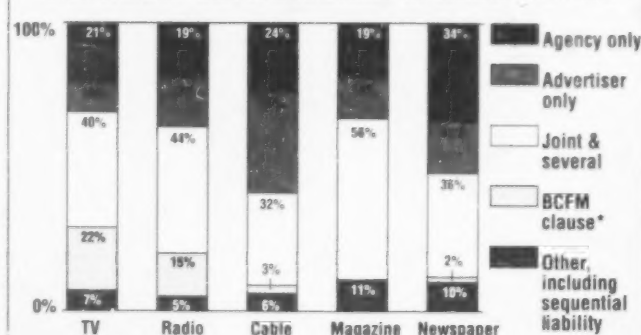
Other forms of liability favored by the media include sole agency; sole advertiser; and the Broadcast

Cable Financial Management Association's compromise clause, which holds agencies liable until

means of liability.

Joint and several liability contracts account for 39% of con-

Contracts each medium is liable to use



Source: Szabo Associates

* Developed by Broadcast Cable Financial Management Association

JOHN SMITHER

they become insolvent, at which time liability shifts to advertisers.

Overall, 43% of Szabo's media company clients favored joint and several liability; 21% used sole agency liability; 15% used sole advertiser liability; 13% used the BCFM clause; and 7% used other

tracts at companies worth less than \$10 million; 42% at \$10 million to \$50 million companies; and 53% at companies worth \$50 million or more. □

Joe Mandese coordinates MediaWorks.

NOTE

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NEWS SUMMARY

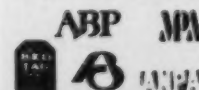
- **General Motors'** new campaign promoting safety is the latest indication that safety themes in ads help sell cars. 1
- **Upfront buyers** for next fall's network TV season are seeking deals that expand on options and guarantees. 1
- **"Redbook"** will be redesigned and repositioned this fall by Hearst Corp., which hopes to establish it as a "bridge book" between *Cosmopolitan* and *Good Housekeeping*. 1
- **Department stores** are fighting the sales slump with aggressive use of image campaigns. 3
- **Brown & Williamson** may reposition its Kool cigarette brand, and Philip Morris plans a new campaign for Virginia Slims. Both face competition from value-price brands. 3
- **Trading card industry** has become a \$1 billion-plus business, attracting new companies and expanding beyond sports to other public personalities. 3
- **Wells, Rich, Greene** may soon become majority owned by BDDF, the French agency group. 3
- **CBS** will team up with four major marketers in the "CBS/Kmart Prime-time Payoff," offering an estimated \$50 million in prizes, to promote the network's new shows in September. ... 4
- **ABC-TV** will air a situation comedy produced by cable TV's Nick at Nite channel, which will also run the shows. 4
- **Pillsbury** will launch Hearty Grains, a "healthy" line of refrigerated dough products, this fall. 4
- **E&J Gallo Winery** is expected to introduce Eden Roc, a midprice sparkling wine to combat fast-growing Cook's. 4
- **Advertising worldwide** is being slowed by tough economic times, with most countries expecting only modest growth this year, a survey shows. 6
- **E! Entertainment Television** cable network is exploring cross-media deals with entertainment magazines to create promotion tie-ins for advertisers. 12
- **Australian marketers** are pressuring their ad agencies to offer integrated marketing services. 16
- **Brazil's** serious decline in ad spending is leading agencies to make changes, including cuts in their usual fees. 17
- **Research revenues** of 71 top research companies increased 8.2% in 1990 to \$1.96 billion. 31
- **Johnnie Walker Black's** sponsorship of the 43-city tour of the "City of Angels" musical signals expansion of sponsorships from sports to the arts. 36
- **Paramount** said its "Passport to Summer Entertainment" cross-promotion with six national marketers provides added exposure for its films in unusual venues. 37
- **Saatchi & Saatchi**, pushing its globalization theory, said at its annual meeting it will offer rewards to employees for campaigns that succeed internationally. 49
- **Southwestern Bell** today starts a \$25 million campaign aimed solely at the add-on market. 49

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Ad spending proves: World is flat

An Advertising Age roundup

Some world markets are seeing advertising growth even though spending in major countries is being hit by tough economic times, according to *Advertising Age's* survey of agencies, advertisers and industry associations internationally.

While the U.K., Australia, Canada and South Africa are hoping for 1991 spending to be flat at best, markets such as Spain and Thailand continue to grow. Many healthy markets, however, have been hurt recently by the sluggish world economy and the Persian Gulf War.

"On an overall basis, [1991 world-wide ad spending growth will be] 2% to 3% in constant terms because of the heavy weight of the U.S., U.K. and Australia," said Robert Coen, senior VP-director of forecasting, McCann-Erickson Worldwide, New York. "If your country has 3% real growth, it's a good year."

Ad Age's figures are in real terms (not adjusted for inflation) and based in local currency.

Europe

In the U.K., "it's been an appalling year," said Steve Winram, media research and information director at Zenith Media Worldwide, London, a Saatchi & Saatchi Co. subsidiary.

But Spain, Thailand light up dim forecasts

"Factors that have really caused the recession—high interest rates, falling consumer expenditures and falling corporate profitability—have started to ease off now," he said. "It's still pretty

GLOBAL NEWS

Recession reports from Australia and Brazil, two of the world's top 10 ad markets—Pages 16, 17

miserable out there, but we think the corner has been turned."

Mr. Winram expects a recovery in the second half.

Ad spending in the U.K. fell 6% in real terms in 1990, the U.K. Advertising Association said. For this year, Mr. Winram said Zenith predicts real ad spending will fall 2.5%.

As the two Germans became one last year, real ad spending growth in what was West Germany hit an estimated 3%, said Volker Nickel, spokesman for ZAW, an advertiser-agency-media organization. In addition, about \$300 million was spent in eastern Germany.

This year, real growth of 1.5% for the entire Germany is expected.

"Most of the growth of the '91 ad spend will come from East Germany," Mr. Nickel said.

Bernd Michael, chairman and partner of Grey Duesseldorf, said an expected tax increase this summer could slow consumer spending. He added, however, that in eastern Germany ad spending could soar to \$640 million.

French ad spending grew 5.6% in real terms in 1990, and this year is likely to be a repeat performance.

With most predictions of 5% to 7% growth, Alain Grange-Caba, president of the Union of Advertisers, said: "That's still twice as high as the French GNP and has better promise of exceeding expectations."

Meanwhile, ad growth in southern Europe remains hot.

The prediction for Spain is Europe's sunniest, with 12% to 15% real ad growth expected. Last year, spending jumped 18%.

The slowdown reflects a normalization of ad spending and the impact of the Gulf war, said Maximo Romero, general director, Association of Spanish Advertisers.

Italy is looking to match 1990 spending growth of 5%.

"Fears related to the Gulf war stifled investments at the beginning of the year, while the economic situation—still stagnant in certain sectors—continues to restrain ad spending to a certain extent," said Felice Liroy, director of the Italian association of advertisers.

Asia/Pacific

Australia's troubles will continue through this year, but there's hope for the future.

In 1990, Australian ad spending dropped in real terms by 1.9%, reported the Advertising Federation of Australia.

"It will be even more dismal in 1991—possibly negative growth up to 5%," said Alex Hamill, ceo of Saatchi & Saatchi Co.'s George Patterson Pty., Sydney.

Twenty accredited ad agencies folded in the 12 months ended March 31, compared with an average of two or three small shops, he said. But there was some good news; the top agencies showed an average 10% increase in billings

in the same period.

Meanwhile, much of Asia continues to grow.

In Thailand, a military coup in February won't slow ad spending from growing at least 8.9% this year.

"Most firms were anticipating cuts from [consumer goods] clients. . . but since controls were lifted, budgets have in fact been increased," an industry analyst said.

Though this year's projected

International ad spending outlook

Figures are based in the local currencies and are in real terms.

Country	1990	1991
U.K.	-6%	-2.5%
Germany	3%	1.5%
France	5.6%	5%
Spain	18%	12%
Italy	5%	5%
Australia	-1.9%	-5%
Thailand	24.5%	8.9%
Taiwan	-0.7%	3.5%
Japan	6.9%	4.2%
Brazil	-5.5%	-30%
Canada	0.6%	0%
South Africa	0%	-8.1%

*Figure for West Germany only.
Source: Advertising Age

growth seems impressive, it follows a booming 1990 in which spending grew 24.5%.

"Some companies with many multinational clients may be affected by the downturn [around the world] but then perhaps only temporarily," said Don Scott, creative director at Far East Advertising, Bangkok.

Hong Kong is cautiously optimistic, hoping the launch of an Asian satellite TV service, plus a new commercial radio station and positive developments in China, will boost ad spending as much as 15%, said Ben Barnes, chairman of the local ad agencies association and managing director of Grey Advertising.

"In Hong Kong, there is a slowdown, not a recession," said Cheong Shin Keong, controller of marketing and sales at TVB, the

territory's dominant TV station.

Taiwan is hoping for a 3.5% real increase in 1991 ad spending, after 1990 spending fell 0.7%.

Growth of 4.2% is expected this year in Japan, where ad spending grew 6.9% in 1990.

"The advertising boom of the late '80s is over," said Don Dillon, exec VP at McCann-Erickson Hakuhodo, Tokyo.

Americas, South Africa

Brazil saw ad spending drop 5.5% in real terms in 1990, according to local trade magazine *Meio & Mensagem*.

The drop began in March 1990 when the government instituted a drastic anti-inflation program. The result is now being called the country's worst recession since World War II, reducing the middle class' purchasing power by an estimated one-third. Spending is likely to tumble to \$2.2 billion, a 30% decline from 1990, agency executives say.

McCann's Mr. Coen, however, said he believes Latin American markets have bottomed out.

"I think the South American countries are starting to show some improvement, if you look at it in constant terms," he said.

In Canada, where the recession is well entrenched, ad spending is expected to pick up in the second half to produce a flat year.

In the first half, ad spending is expected to fall 1%, thanks to the Gulf war coverage that preempted many TV spots and the implementation of a new 7% goods and services tax.

"I expect that we should be out of the recession starting as early as this summer," said John Foss, president-ceo of the Association of Canadian Advertisers. "But we won't see the kind of return we saw after the recession in the early 1980s."

In 1990, Canadian ad spending grew only 0.6%.

South Africa welcomed flat spending in 1990. The release of Nelson Mandela in February 1990 brightened the troubled economy during the early part of the year. By fall, however, violence and strikes dampened consumer spending. The troubles and the attitude continue, with spending expected to drop about 8.1% this year. □

Written by Julie Skur Hill from bureau reports.

THE SECRETS OF NEW PRODUCT SUCCESS. A FREE SAMPLE.

1. Great ideas aren't the answer.

Just as a good idea may stop you from going on to discover a great one, a great idea may stop you from going on to discover the right one. After you get a great idea, continue to look for the right idea.

2. Exact appropriateness.

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Minn. group shows toll of ad taxes

By Bob Geiger

MINNEAPOLIS—In an effort to blunt future ad tax legislation, a cartel of Minnesota marketing groups on June 24 will unveil a yearlong study of the effect of ad taxes on the state's economy.

"The days of rhetoric are over with legislators. . . You have to show them the direct results of a sales tax" on advertising, said Dean Buresh, president of Kamstra Communications, St. Paul, and chairman of the Communications Industry Coalition, which funded the study and is sponsoring a symposium on that day.

Encompassing 12 ad tax scenarios ranging from a collateral service tax to taxing of all advertising activity, the "Minnesota Model" study projects that all businesses statewide would lose as

much as \$288.7 million in revenues and 5,961 jobs. Of that, \$158.9 million in revenues—55%—and 1,789 jobs, or 30%, would come from communications industries.

The study projects that an effort similar to Florida's short-lived 1987 media ad tax would cost Minnesota businesses \$211.7 million in annual revenues and 4,346 jobs.

"Minnesota Model" surveys were sent to 940 member companies of Communications Industry Coalition organizations in 1990. Revenue figures from the 205 respondents were cross-checked with the Minnesota Department of Revenue, federal government and industry data, Mr. Buresh said.

The coalition is in a continuing battle with the state Department of Revenue, which is proposing guide-

lines that expand the state's 6% sales tax to collateral services. The study projects that would cut \$2.8 million and 32 jobs from Minnesota's communications industries.

Assuming a 5% decrease in collateral demand because of a tax, the study estimates those losses would rise to \$24.3 million and 278 communication industry jobs.

Three Minnesota bills introduced this year to tax advertising services failed to get a hearing before state lawmakers adjourned May 20.

Coalition members include the Advertising Federation of Minnesota, Twin Cities Council of the American Association of Advertising Agencies, Minnesota Newspaper Association, Minnesota Broadcasters Association, Printing Industry of Minnesota and the state chapter of the Public Relations Society of America. □